

The organic retail Market in Germany, France and Britain

Tbilisi, 11. Sept. 2009

The four biggest organic consumer countries

■ USA:

23 bn US\$ (16 bn EUR) in 2008
= 16 % growth in 2008

■ Germany:

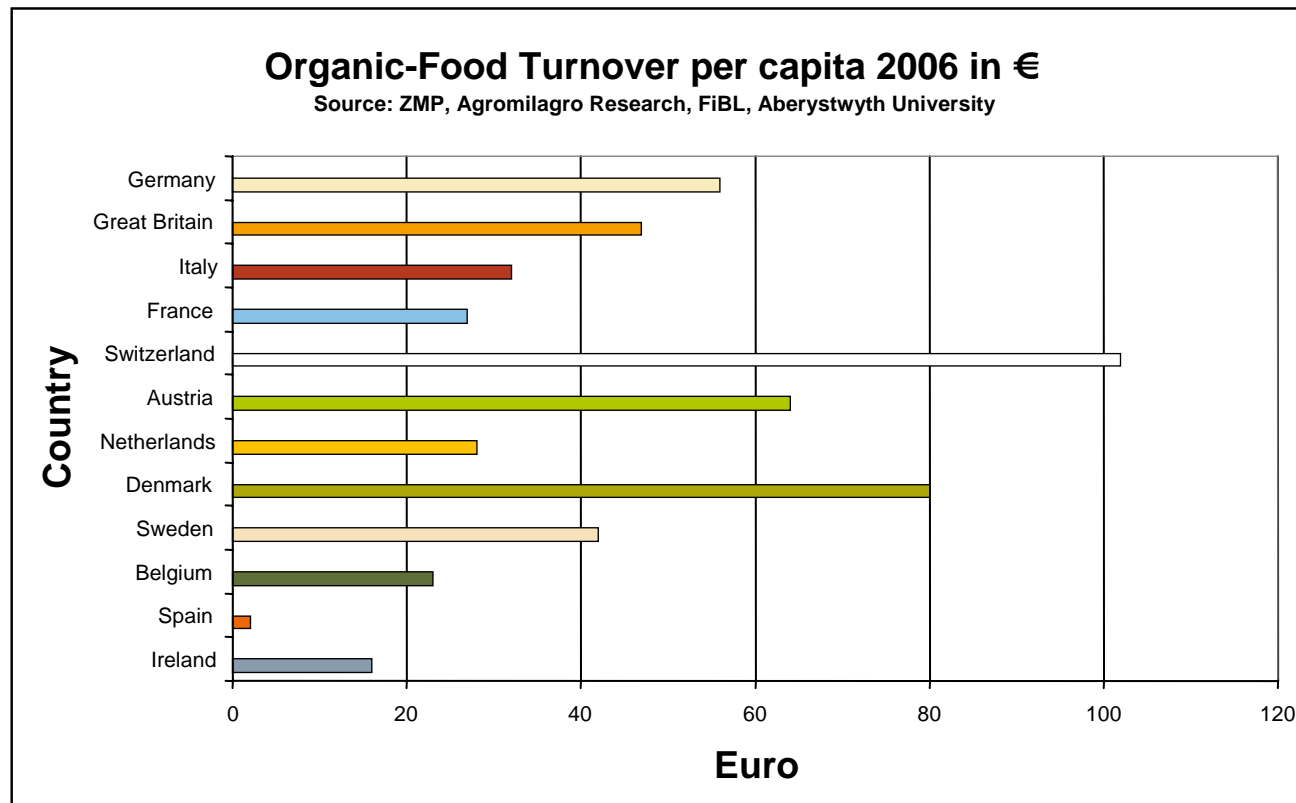
5.8 bn EUR in 2008 – 5,3 bn EUR in 2007
= 10 % growth

■ Great Britain:

2.1 bn Pounds (2,1 bn EUR) 2008
= 1,7 % growth

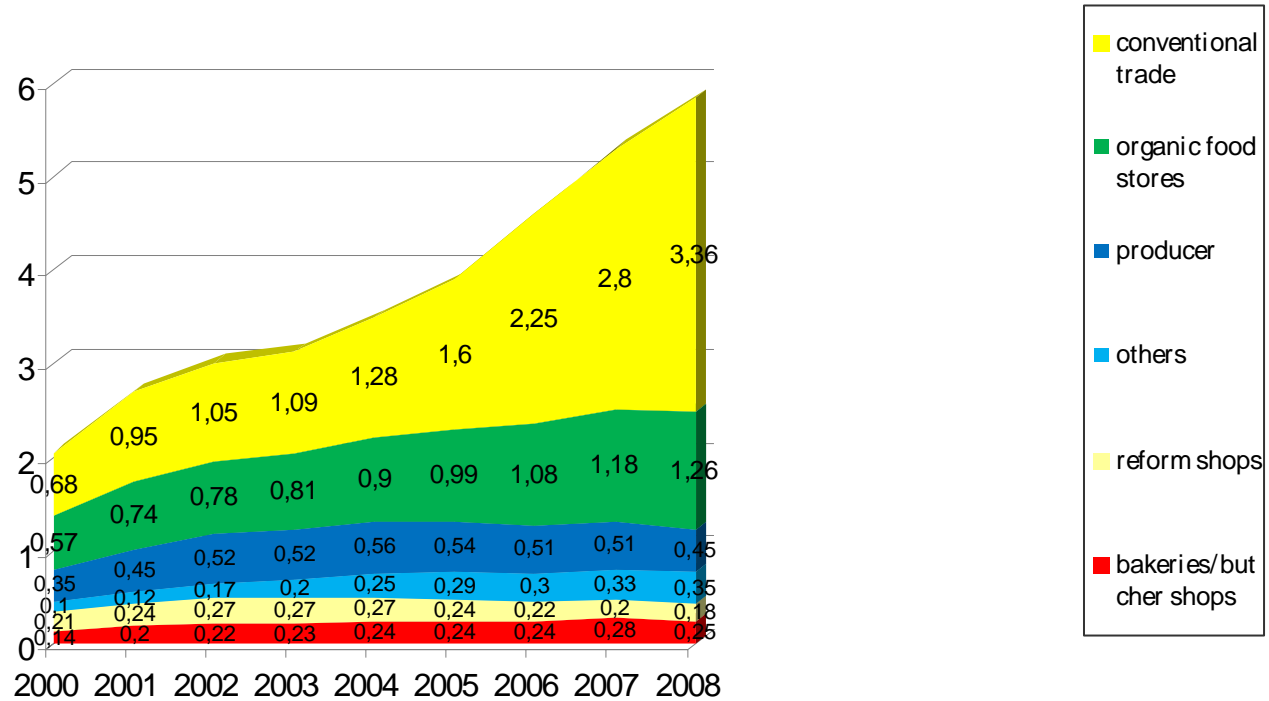
■ France:

2.6 bn EUR in 2008, 25 % growth



Development of Food sales according to Sales Channels in bn Euro

Source: Prof.Hamm, Uni Kassel/ M. Rippin, Agromilagro



Organic in German conventional retail

- 20 % growth in 2008
- Conventional retailers:
400 – 500 articles, up to 1.000-2.000
- Rewe and Edeka:
Strong growth in organic product range
- Discounter:
50 – 100 articles in over 14.000 outlets

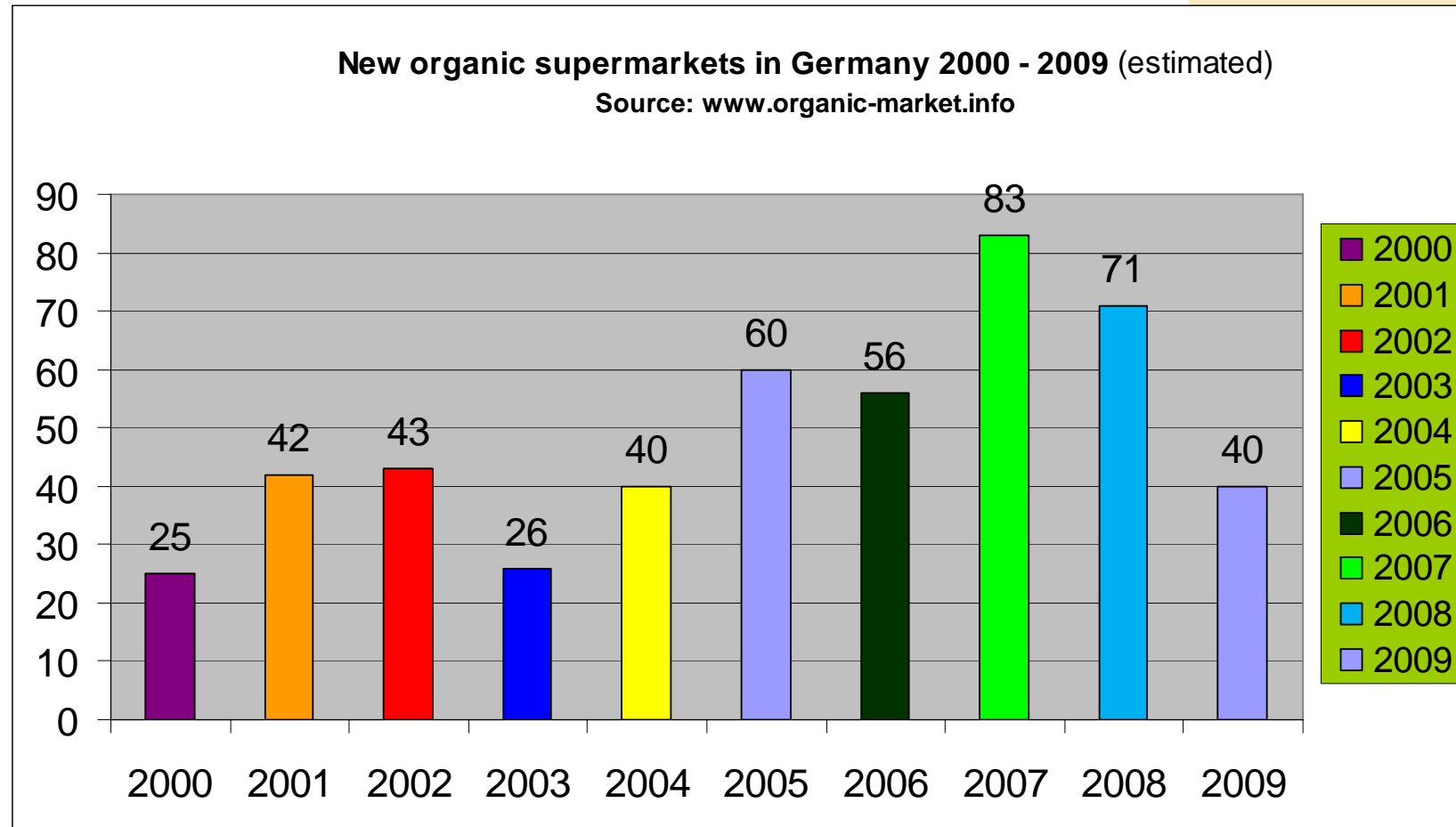
Organic market shares in conventional retail

■ Baby food	67 %
■ Vegetable juices	< 30 %
■ Carrots	27 %*
■ Muesli	20 %
■ Bananas	15 %*
■ Fresh milk	10 %
■ Frozen Food	< 10 %
■ Eggs	> 10 %

(* incl. specialized trade, Agromilagro/ZMP/GFK)

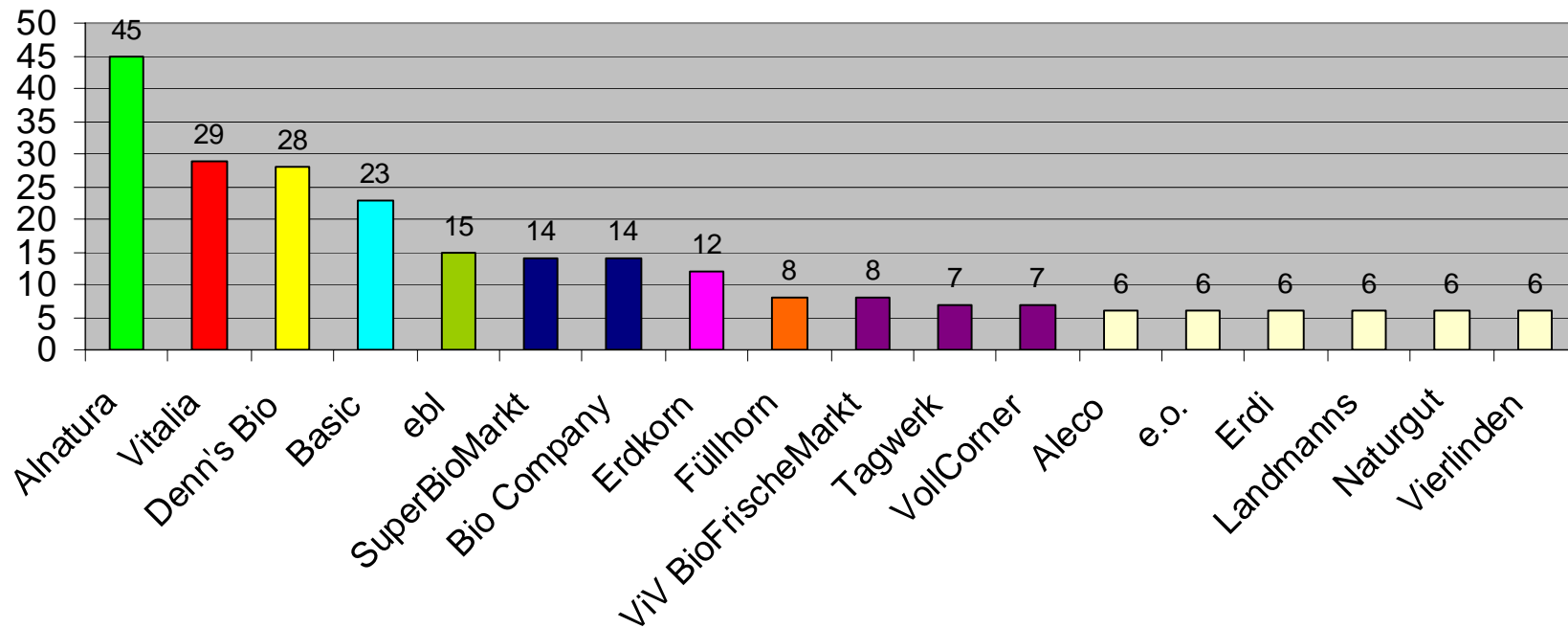
Organic food chains in Germany

- 17 organic supermarket chains with 5 to 50 outlets
- Biggest chains: Alnatura, Basic, Denms bio, Erdkorn
- Alnatura sales in 2008: 304 million EUR
SuperNaturmärkte: ~ 150 million EUR
- Basic sales 2008:
93 million EUR, target 2009: 98 million EUR



Chain Stores - Number of Outlets 2008

Source: www.organic-market.info



Reasons for a strong growth in Germany

- 3000 organic and 1700 health food stores
- Organic products are available in all food stores
- Discussion about pesticide residues in conv. Food
- Modern appearance of packaging and labeling

- Professional presentation at the Point of Sale
- Clear perception what is organic with state logo
- Free from GMO
- Modern marketing

Developments in Germany

- Boom of organic supermarkets: 550 in 2009
- Market share growth of discounters and conventional supermarket chains to over 60 %
- Further market growth at about 5 - 10 % p.a.
- 2010: over 6 bn EUR organic sales, 4-5 % market share of total food market

Organic food stores in Great Britain

- 2000 natural and organic retailers,
- only a small part with fresh fruit + vegetables
- About a dozen natural and organic supermarkets in London, e.g. Planet Organic, As Nature Intended
- The part of the market of natural and organic food stores is below 20 %
- The main part is the conventional retail doing ~80 %
- Natural and organic food stores only have a percentage of 60-80 % organic, some exceptions have over 95% organic

Organic food stores in France

- 1900 organic retailers
- over 90 % organic in most shops
- different chains like La Vie Claire, Satoriz, Naturalia, L'Eau Vive
- Marketing networks like Biocoop, Biomonde
- Market share of independent retailers is 37 %*
- conventional retail market: 39 %*
- shops ordering directly at manufacturer, weak position of wholesalers

*Source: Specialised retail report 2008



Nürnberg, Germany
17. – 20.2.2010

BioFach 2010

Weltleitmesse für Bio-Produkte
World Organic Trade Fair

Hier trifft sich die Bio-Welt
Where organic people meet



Nürnberg, Germany
17. – 20.2.2010

Vivanness 2010

Weltleitmesse für Naturkosmetik und Wellness
World Trade Fair for Natural Personal Care and Wellness

NÜRNBERG / MESSE

BioFach and Vivaness 2009

BioFach 2009:

2733 Exhibitors - 66 % international

47.000 visitors - 38 % international

Only professional visitors are allowed

BioFach 2010

Nürnberg, Germany, World Organic Trade Fair,

17. – 20.2.2010

<http://www.biofach.com>

Seeking more information?

> Organic-Market.Info Online-Magazine
in English, German and French

www.organic-market.info www.bio-markt.info www.bio-marche.info

> BioFach Newsletter in English, German, Spanish

www.biofach.com/newsletter

> The Specialised Organic Retail Report Europe 2008

The report gives a very good survey on all European countries including the non EU countries. It can be ordered for 260 Euros: info@ecozept.de

Thanks for your attention!

Najljepša hvala na ukazanoj pozornosti!

Danke für Ihre Aufmerksamkeit!

Grazie per la Vostra attenzione!

Köszönjük figyelmüket!